

## **LUCAS COUNTY WORKFORCE DEVELOPMENT AGENCY (LCWDA) INDIVIDUAL TRAINING ACCOUNT POLICY**

The Workforce Investment Act (WIA) Individual Training Account program is administered in Lucas County under the authorizations of the Workforce Investment Act of 1998 and the Rules and Regulations governing the training programs authorized under WIA Regulations that are defined in Sections 663.300 through 663.565.

Education and Training for qualified WIA participants will be administered by means of Individual Training Accounts (ITAs) in order to provide formal schooling or training in order to assist these individuals to obtain or retain self-sufficiency. The participants must demonstrate a need for formal training through the Core and Intensive Service tiers of the One-Stop Center operations, and the participant has failed to obtain and retain employment that leads to self-sufficiency through the Self Service, Core, and Intensive Services tiers of the One-Stop.

The following guidelines apply in managing WIA ITA awards:

The revisions in this policy shall apply to new ITAs, and ITA contract renewals for next fiscal year. It will not affect Fiscal Year 2004 ITA awards already issued; no current contracts will be reduced due to these revisions for the remainder of this fiscal year.

### **WIA ITA Requirements**

1. ITA will only be approved for training courses that are on the Eligible Training Provider (ETP) list for the state of Ohio. By securing this approval the Training Provider has made a commitment to meet the performance standards as outlined in the WIA Rules and Regulations.
2. A program of training services is one or more courses or classes, or structured regimen, that upon successful completion, leads to:
  - a.) A certificate, an associate degree, baccalaureate degree, or
  - b.) The skills or competencies needed for a specific job or jobs, an occupation, occupational group, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to training.
3. ITA funding will not pay for such things as master's or doctorate degrees. All training programs on the state eligible list will be considered eligible in the local area unless removed by the local Workforce Policy Board as a training provider.
4. WIA ITA funds are only authorized to pay for tuition and books, required equipment, and other associated fees for the training program, less the PELL, OIG, and other grants, financial aid, or Work Study contributions. Other Supportive Services programs may address other

needs. (See Supportive Services Policy that is currently in effect when the participant needs services and not necessarily the date of this policy.)

5. ITA funds in Lucas County are limited to:
  - a. \$4,000 maximum per fiscal year
  - b. \$12,000 maximum lifetime funding, unless their ITA was written prior to FY04, then up to \$4,000 would be allowed per fiscal year to complete the training as written in the ITA
  - c. Maximum period for funding will be three (3) training years depending on the availability of funding, where a training year begins on the first day of training and runs for twelve (12) consecutive months.
  - d. The ITA will not cover a Bachelor's Degree unless the recipient has successfully completed at least 4 full-time semesters or 6 full-time quarters AND the recipient can complete the degree within the three (3) year maximum training period. The participant must provide a transcript and a plan of study from the institution documenting they can complete the degree requirements in the three year time limit.
  - e. The ITA will cover training up to one year for a participant holding a Bachelor's Degree for upgrade purposes only if the current diploma will not lead to direct employment.
6. In order to receive ITA reimbursement, the participating service provider must first complete the ITA Authorization Form and return it to the WDM/D to give final approval for the ITA. **Failure to secure this approval may result in refusal for funding.**
7. Lucas County ITA funds will pay for education and training expenses at any educational institution that appears on the state Eligible Training Provider list at the maximums as stated above. This program is available to serve Lucas County residents or non-residents. However, funding the ITA will be at the lesser cost when comparing ITA benefits of the two counties regardless of residency. In the case of Dislocated Workers who have worked in Lucas County, but reside outside of Lucas County, these workers will be treated as Lucas County residents in respect to services for training allowances.
8. In case of limited funds it becomes necessary to assign a priority system for ITA funding, service will first be given to recipients of Public Assistance, then to low-income individuals, as determined by the WPB (See Adult Limited Funding Policy and Dislocated Worker/Rapid Response Most- in-Need Policy for Training Services which refer those

policies that are in effect when the participant needs services and not necessarily the date of these policies.)

9. The training occupation should have career advancement potential and must be in accordance with the recipients' Individual Employment Plan (IEP).

### **WIA Student Requirements**

1. Students must have applied for WIA services and have been determined by a WIA Case Manager to be eligible for training services, having completed at least one Core and one Intensive Service through the Lucas County One-Stop or by a business or agency that provides Core and Intensive Services, with the approval of the LCWDA designee.
2. Students must complete an Individual Employment Plan (IEP) that details the participant's skills, interests, and abilities, documents the Core and Intensive Services provided to the student, and sets specific goals for the student to meet in order to obtain or retain employment that leads to self-sufficiency.
3. Students must choose a training program that is consistent with their skills, interests, and abilities, with the assistance of the WIA Case Manager.
4. Students in qualifying programs must apply for PELL, OIG, and other appropriate grants before utilizing WIA funds.
5. Students must select programs of training services that are directly linked to employment opportunities in the local area as specified in the Demand Occupation List for Lucas County or in another area in which they are willing to relocate. In the case where the program of training is NOT on the Demand Occupation List, the participant must present a "bona fide" job offer in writing from an employer, which states that upon successful completion of the ITA, the employer will hire the participant.
6. Individuals, whose services are provided under the adult funding stream, must be determined eligible under the priority system when those funds are limited.
7. All eligible students may receive the first ITA without restrictions. After the first quarter or semester, the student must be in good academic standing and/or have maintained a "C" average in the program of study, unless a higher grade point average is required by the ETP. In the event

that the student does not reach this standard, interventions, including intensive case management services, will be offered to the student.

A student may not change majors after the ITA is signed; if the student does change majors, ITA funds will not be obligated for payment nor continuation of the ITA.

If the student fails to maintain good academic standing and/or a “C” average for the second consecutive quarter or semester, that student will be ineligible to receive additional WIA funding until the student makes a “good faith” effort to modify his/her circumstances. This “good faith” effort can include life skills classes, counseling, a re-evaluation of skills, interests, and abilities, a request for additional supportive services, etc, and will be coordinated by the student’s WIA Case Manager.

If the student continues to fail to maintain good academic standing and/or a “C” average for three consecutive quarters or semesters, that student will be ineligible for WIA funding for one (1) calendar year.

If a student quits a training program, he/she may be required to pay back (reimburse) the amount of funding received.

If the student has no contact with their WIA Case Manager for ninety (90) days, the ITA will be deemed inactive and the contract may be cancelled. The student is obligated to pay back any costs incurred after the 90 day period.